



## REPORT OF KEY FINDINGS

# NSW Recreational Boater Survey 2023

Prepared for Transport for NSW  
August 2023



Transport  
for NSW



OFFICIAL

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### NOTE ABOUT FIGURE AND TABLE NUMBERING

This is a summary version of the full report (termed the “Technical Report”). Figure and Table Numbers have been amended in this Report of Key Findings to ensure they are sequential. However that means that they will not correspond to the equivalent Figure or Table number in the Technical Report.

### OTHER INCLUSIONS WITHIN THE TECHNICAL REPORT

The Technical Report includes a detailed methodology and information on sampling error and weighting, results for all questions, plus additional analysis on statistically significant differences between different groupings within the 2023 survey. It also includes both CATI (telephone) and online questionnaires, and the list of postcodes surveyed within the Victorian and Queensland border regions.



# 1. EXECUTIVE SUMMARY

Transport for NSW (TfNSW) commissioned Taverner Research to conduct two surveys relating to boating participation and behaviour across NSW: a random telephone survey of 4,000 adult residents, and an online survey of 1,593 NSW residents who had used watercraft over the summer of 2022-23. Fieldwork was conducted between late February and early May 2023.

**This report describes the main findings from the two surveys. A more comprehensive technical report, “6612 Boaters Survey Technical Report”, which outlines the full set of findings, is also available.**

## Boater Participation Survey

The Boater Participation Survey (BPS) was a random and representative telephone survey of 3,000 NSW households, plus 500 households in each of the Victorian and Queensland border regions. Based on a similar survey conducted by TfNSW in 2018, It aimed to understand boating participation on NSW waterways over the summer of 2022/23.

The total sample size for the households represented by these 4,000 respondents was n=11,494 residents. Random sampling error (RSE) for the overall sample of n=11,494 is +/- 0.9%, calculated at the 95% confidence level.

## Boater Behaviour Survey

The Boater Behaviour Survey (BBS) was a self-selecting online survey for completion by any NSW resident owning a recreational boat or other watercraft. Based on similar surveys conducted by TfNSW in 2018 and 2019, it aimed to measure the behaviours and attitudes of NSW boaters, including waterway usage over summer 2022/23; watercraft ownership; ownership and usage of life jackets and other emergency equipment; details of recent trips; and views relating to marine infrastructure and boating sustainability.

Total sample size for this survey was 1,593 residents. Due to the methodology employed, random sampling error cannot be applied to these results.

It also needs to be acknowledged that the BBS sample was skewed towards males (90% of respondents), those living outside Sydney (67%), non-CALD/those speaking only English at home (90%), and older residents (with 66% of respondents aged over 50).

A summary of key findings from these two surveys is provided below.

## Boater Participation Survey

### Boating participation

- 22% of NSW residents said they or a household member had spent time in a recreational boat or watercraft on NSW waterways from December 2022 to February 2023 – up from 16% in 2018.
- This suggests that the number of NSW residents having spent time in recreational boats or other watercraft during this period was between 1.70 million and 1.85 million.





## 1. EXECUTIVE SUMMARY

- Boating participation was highest in regional NSW (25%, up from 19% in 2018) and lower in Greater Sydney (19%, against 14% in 2018).
- As in 2018, males were significantly more likely to have been on watercraft than females (24% and 20% respectively). But participation rates were up significantly across both genders, across metro and regional NSW.

### Types of watercraft

- The most common watercraft used over summer 2022/23 included paddle craft (7%), powered boats 4.8m+ (7%), powered boats less than 4.8m (6%), stand-up paddleboards (4%), and personal watercraft (PWC) (2%). The most dramatic increase in usage was stand-up paddleboards, increasing from 1% in 2018. Jet ski usage also doubled (albeit from 1 to 2%).
- Extrapolated to the NSW population, this equates to approximately:
  - 590,000 paddle craft users
  - 550,000 users of powered boats 4.8 metres or longer
  - 450,000 users of powered boats less than 4.8 metres
  - 356,000 stand-up paddleboard users
  - 151,000 jet ski users
- In all, 11% of NSW households owned some form of paddle craft (canoes, kayaks etc), up from 9% in 2018. Six per cent had stand-up paddleboards (up from just 1%), 5% had powered boats less than 4.8m (up from 4%) and 4% had powered boats 4.8+m long (same

as 2018). One per cent owned a PWC, double that of 2018.

### Licences and memberships

- 9% of respondents claimed to have a Personal Watercraft (PWC) or recreational boat licence – up from 7% in 2018. Across regional NSW, 12% claimed to have such licences (against 9% in 2018).
- 3% of respondents were members of a boating or watercraft club or association – unchanged since 2018.

### Boating Behaviour Survey

#### Vessel ownership

- Among boating users, ownership of powered boats 4.8m+ rose from 34% in 2019 to 38% in 2023, while stand-up paddleboard ownership rose from 10% of households to 21%, and jet skis from 4% to 9%. Ownership of unpowered dinghies, “tinnies” or rowboats fell from 14% to 9%.
- Nearly half (44%) of households that owned a registrable vessel also owned a non-registrable vessel.
- The proportion of boating households owning four or more watercrafts rose from 16% in 2019 to 25% in 2023.
- Half of those surveyed typically travelled 10km or more to access the water.

#### Safety equipment

- 96% of powerboat and larger (4.8m+) sailboats claimed to carry sufficient lifejackets on board. For smaller (<4.8m) sailboats this figure was 75% - up from 71% in 2019. For dinghies, the figure was 69% (up from 64% in 2019).
- For powered and sailing boats, over 90% said they carried mobile phones,



## 1. EXECUTIVE SUMMARY

sufficient lifejackets, an anchor, drinking water, bucket/s with lanyard, and fire extinguishers.

- On-board safety equipment registering less than 80% usage were paper maps (now typically less than 50%), flares (79% of larger boats, 41% of smaller), Emergency Position Indicating Radio Beacons, or EPIRBs (69% larger, 24% smaller), marine radios (85% of larger but only 41% of smaller), V-sheets (83% of larger but only 48% of smaller), and compasses (85% larger, 49% smaller).
- Usage of safety equipment was either similar or increased for most boat types in 2023 compared with 2019. However, dinghies exhibited generally lower rates of safety equipment usage than in 2019.
- Regularity of checking safety equipment fell for larger powerboats (from 75% “before every or most trips” in 2019 to 70% in 2023) and smaller powerboats (from 87% to 74%). Likewise for smaller sail boats, regular checks fell from 96% to 73%.

### Lifejackets

- 97% of respondents claimed to own one or more lifejackets. Of these:
  - 65% owned foam lifejackets
  - 59% owned manual inflatable lifejackets
  - 37% owned auto inflatable lifejackets
- Of those with lifejackets, 29% of “the one used most often” had been bought within the past 12 months. However, 43% were two or more years old, and 12% five or more years old.
- For those with inflatable lifejackets, 62% of “the inflatable lifejacket I use most

often” had been serviced within the past 12 months. However, 27% had not been serviced since purchase. This dropped to 18% of those whose inflatable lifejacket used most often was purchased more than a year ago.

- Asked when they would be most likely to wear a lifejacket, only 41% said “always”. 42% said “when I think I might need it”, 33% “when conditions are rough”, 32% “when I am offshore” and 28% “when weather is bad”. One in five (22%) said they would wear one when required by law, and 21% when there were children on board.

### Raising alarms

- 90% of respondents said their preferred method of raising an alarm or seeking help in an emergency was their mobile phone. A further 46% mentioned a VHF radio, 30% an EPIRB, 27% flares and 16% said 27 MHz radio.
- While mobile phones were the most popular method of raising an alarm for all boat users, sailors showed a higher preference for VHF radio than those in powered boats (70% and 49% respectively).

### Boating trips

- The most common type of waterway used was harbours, ports, and estuaries (by 45% of respondents). Around a third reported visiting each of creeks/streams/rivers, coastal bays/inlets, open waters, or lakes/dams/reservoirs.
- 70% of most recent trips were launched from boat ramps, against 11% for beach/ shoreline, 9% for moorings and 7% for marinas.





## 1. EXECUTIVE SUMMARY

- The most common launch time was 6-7am (20%), with 52% of trips launched between 5-8am. The most common return time was 2-3pm (17%), with 42% of returns from 2-5pm. The most common duration of trips was 6-7 hours (14%), with 40% of trips between 4-7 hours. Ten per cent of most recent trips involved staying out overnight.
- The most common activities for most recent trip included fishing (58%), cruising or sightseeing (22%), fitness or training (5%), racing (4%) and waterskiing (also 4%).
- 88% of respondents claimed to have observed weather or swell conditions via at least one method prior to launch. 74% had checked all safety equipment was on board and in working order, while 72% had told someone where they were going and when they would be back (or used a log on/log off service).
- 78% said they used the Bureau of Meteorology (BOM) website to check weather ahead of the trip (up from 72% in 2019). Fifty-five per cent used a mobile app, while 46% looked outside and 16% visited the NSW Maritime website (consistent with 2019).
- Only 20% of trips were taken alone – down from 34% in 2019. Most commonly the respondent reported having one or two other people with them (33% and 22% respectively).

### Lifeboat wearing claimed on most recent trip

- Those respondents most likely to say they wore a lifejacket all of the time included those on jet skis (100%), paddle craft (83%) and smaller powerboats (57%). By contrast, less than one in five (19%) of those on larger sailboats and one-third (33%) of larger

powerboat users said they wore a lifejacket the whole time.

- Those respondents most likely to say they wore a lifejacket none of the time included those on larger sailboats (59%), larger power boats (46%) and smaller powerboats (26%). By contrast, none of the jet ski users and only around one in ten (9%) paddle craft users said they never wore a lifejacket.
- Lifejacket-wearing among passengers declined from 2019 to 2023. In 2019, 42% of passengers (i.e., other than skipper) were reported to have worn a lifejacket “all the time” on their most recent trip. This fell to 39% in 2023. Conversely, the percentage of passengers not wearing lifejackets at all rose from 34% in 2019 to 41% in 2023.
- Major reasons for non-lifejacket wearing included good weather conditions (54%), remaining close to shore or being in enclosed waters (25%), being with other people (21%), saying it was “not required” (16%) or feeling it was not warranted due to size of vessel (15%). Interestingly, lack of comfort was very rarely cited as a reason, accounting for less than 0.1% of responses.
- Of lifejackets worn on the latest trip, 45% were manual inflatable, 29% foam, and 26% auto inflatable. Experienced boaters were significantly more likely to wear auto-inflatable lifejackets whereas newer boaters were more likely to wear foam lifejackets.
- Those respondents most likely to say their passengers wore a lifejacket all of the time included those on jet skis (100%), paddle craft (76%) and smaller powerboats (57%). By contrast, nearly a third (30%) of those on larger



## 1. EXECUTIVE SUMMARY

powerboats and almost a quarter (24%) of larger sailboat users said their passengers wore a lifejacket the whole time.

- Those respondents most likely to say their passengers wore a lifejacket none of the time included those on a larger sailboat (58%) and larger powerboats (46%). By contrast, nearly a third (28%) of those on smaller powerboats, almost a quarter (24%) of those on paddle craft, and no jet ski users said their passengers wore a lifejacket none of the time.

### Information Sought

- The information most commonly sought in the previous 12 months related to fishing spots or tips (by 57% of respondents), general boating laws/regulations (53%), lifejacket wearing or servicing requirements (40%), where to launch (also 40%), water safety (35%), and best places to visit (also 35%).
- The sources of information most commonly used were general internet/Google searches (65%), social media (45%), NSW Government websites (40%), phone apps (34%), tackle and bait shops (25%), other boaters (21%), family and friends (19%), boating guides (18%) and clubs or organisations (16%).

### Safety Training

- Almost half of those surveyed (47%) had completed a boating safety course – up from 44% in 2019. This includes 67% of sailors, 62% of jet ski riders, 46% of powerboaters and 51% of paddlers.
- The training providers most commonly accessed were clubs and associations (26%), NSW Maritime (23%), a tertiary

institution (20%) and a boating college (19%).

### Boating infrastructure and amenities

- There was a decrease in usage of boat ramp car parks (67% in 2023 against 74% in 2019), and an increase in usage of courtesy moorings (21% in 2023 vs. 17% in 2019). Three-quarters (74%) had used boat ramps, unchanged from 2019, while 56% had used boat ramp toilets, 53% wharves or jetties associated with ramps, 44% fish cleaning tables, 37% garbage facilities, 32% boat washdown facilities, and 23% public moorings – all broadly unchanged.
- Infrastructure deemed most important was led by boat ramps (84%), boat ramp car parks (82%) and boat ramp toilets (also 82%). Other amenities deemed important included navigation buoys/safety signage (74%), wharves and jetties associated with ramps (69%), garbage facilities (68%), fish cleaning tables (61%), lighting (59%), boat wash down facilities (56%) and additional boat ramp lanes (53%).
- Half (48%) of respondents felt there had been improvements in the standard of boating infrastructure and amenities on NSW waterways, while 18% believed there had been a deterioration.
- However, only 19% were satisfied with the provision of navigation dredging works on NSW waterways, against 30% dissatisfied.

### Environmental management

- 36% of respondents were satisfied with the environmental management of pollution from boats on NSW waterways, against 15% dissatisfied. Major reasons for dissatisfaction



## 1. EXECUTIVE SUMMARY

included perceived lack of management/maintenance (33% of those dissatisfied) and visible rubbish/litter (32%).

- Only 18% were satisfied with the environmental management of old 'end of life' vessels on moorings and foreshores, against 27% dissatisfied (but with 54% neutral or unsure). Major reasons for dissatisfaction included concern over abandoned or derelict boats (49% of those dissatisfied) or that they are taking up space (30%).

- 14% of respondents (221 in all) reported a "near miss" during the summer 2022/23 period, which is similar to the 13% reported in 2019.

Drawing on these findings, a series of conclusions around boating participation and behaviour are provided in Section 4.

### Problems and problem users

- Major perceived problems on NSW waterways were marine litter and debris (seen as a "big problem" by 38% of respondents), excessive/unsafe speeds (38%), boaters getting too close (37%), vessel wash (31%), and the attitude/behaviour of other waterway users (28%).
- Groups seen as being "a problem" on NSW waterways included jet ski users (nominated by 81% of respondents, consistent with 2019), tow sport users (26%, down from 36% in 2019), powerboat users (20%, down from 40% in 2019), and people using boat ramps and pontoons etc (18%, not measured in 2019). Less than 10% felt that paddle craft users, sailors or divers were a problem.

### Accidents

- Two per cent of respondents (32 in all) had had an accident over the period October 2022 to February 2023 (against 3% in the 2018/2019 summer).
- Only 18% of these accidents were reported.



## 2. BOATING PARTICIPATION SURVEY FINDINGS

Incidence of watercraft usage on NSW waterways over the summer of 2022/23 was significantly higher than that recorded in the 2018 survey. As shown in **Figure 1**, below, **22% of all NSW residents said they or a household member had spent time in a recreational boat or watercraft on NSW waterways during the period December 2022 to February 2023 – up from 16% in 2018.**

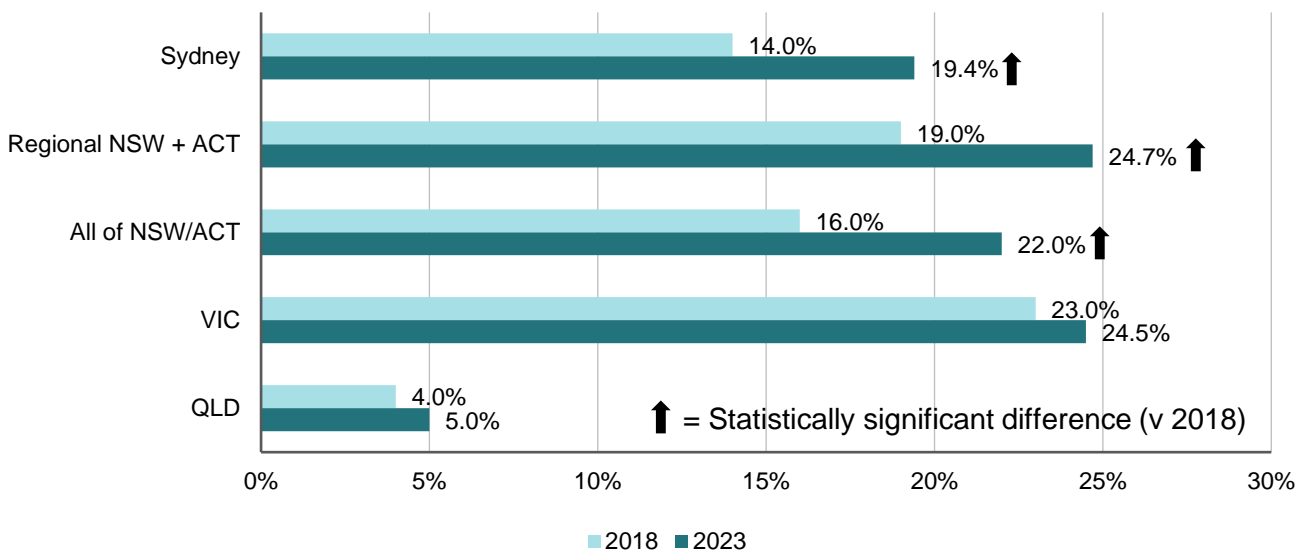
This rise was consistent between Sydney (rising from 14% to 19%) and NSW regional areas (19% to 25%).

At the time of the August 2021 ABS Census, the population of NSW was 8,072,163 persons. Given the survey’s sampling error, this suggests that the number of NSW residents having spent time in recreational boats or other watercraft during the period December 2022 to February 2023 was between 1.70 million and 1.85 million.

**Figure 1: Individual participation by location**

**S4** Did you, or anyone else in your household, spend any time in recreational boats or watercraft on NSW waterways (for those in Vic, including the Murray River, for those in Qld, including the Tweed River) during December to February just gone?

Base: All respondents, stacked to individual level (2018 n=10,434, 2023 n=11,494)



As in 2018, the most popular vessel types in terms of participation (**Figure 2**) were paddle craft and both small and large power vessels. The popularity of paddle craft may stem from their ease of storage and use, exercise benefits and comparatively low cost, while small and large power vessels remain popular due to their utility for a wide range of boating activities such as fishing, transport, sightseeing and towing activities like waterskiing.



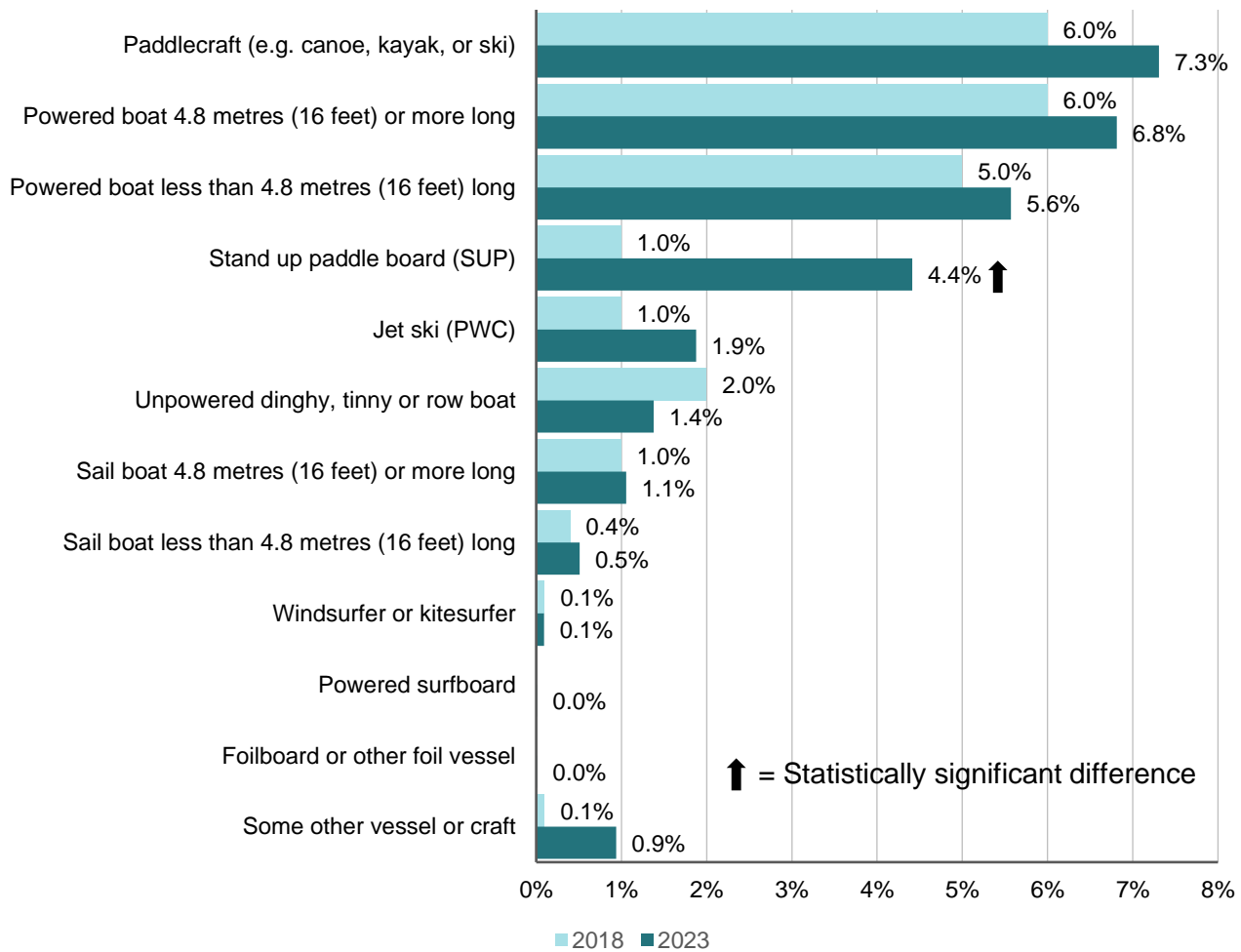
## 2. BOATING PARTICIPATION SURVEY FINDINGS

Overall participation **Figure 2** is up in most cases<sup>1</sup>, most notably in relation to stand-up paddleboards (SUPs) up from 1% in 2018 to 4.4% in 2023. SUPs are a relatively new watercraft type that appears to have increased in popularity due to their portability, exercise benefit and comparatively low cost. Personal watercraft (PWC, also known as jet skis) also showed some indication of an increase over the period (from 1% to 1.9%), although its change was not quite statistically significant.

**Figure 2: NSW Participation by vessel type**

**Q6. What types of recreational boats or watercraft did you spend time on in NSW waterways?**

Base: All respondents in NSW (2018 n=8,004, 2023 n=8,633)



<sup>1</sup> Due to small sample sizes, Queensland and Victorian border areas are omitted.



## 2. BOATING PARTICIPATION SURVEY FINDINGS

**Extrapolated to the NSW population, this equates to approximately:**

- 590,000 paddle craft users
- 550,000 users of powered boats 4.8 metres or longer
- 450,000 users of powered boats less than 4.8 metres
- 356,000 stand-up paddleboard users
- 151,000 jet ski users
- 111,000 users of unpowered dinghies, tinnies or row boats
- 85,000 users of sailboats 4.8 metres or longer
- 41,000 users of sailboats less than 4.8 metres.

Allowing for some duplication between powered and unpowered watercraft, this suggests that there are more than one million users of powered boats, and additionally more than one million users of unpowered watercraft in NSW.





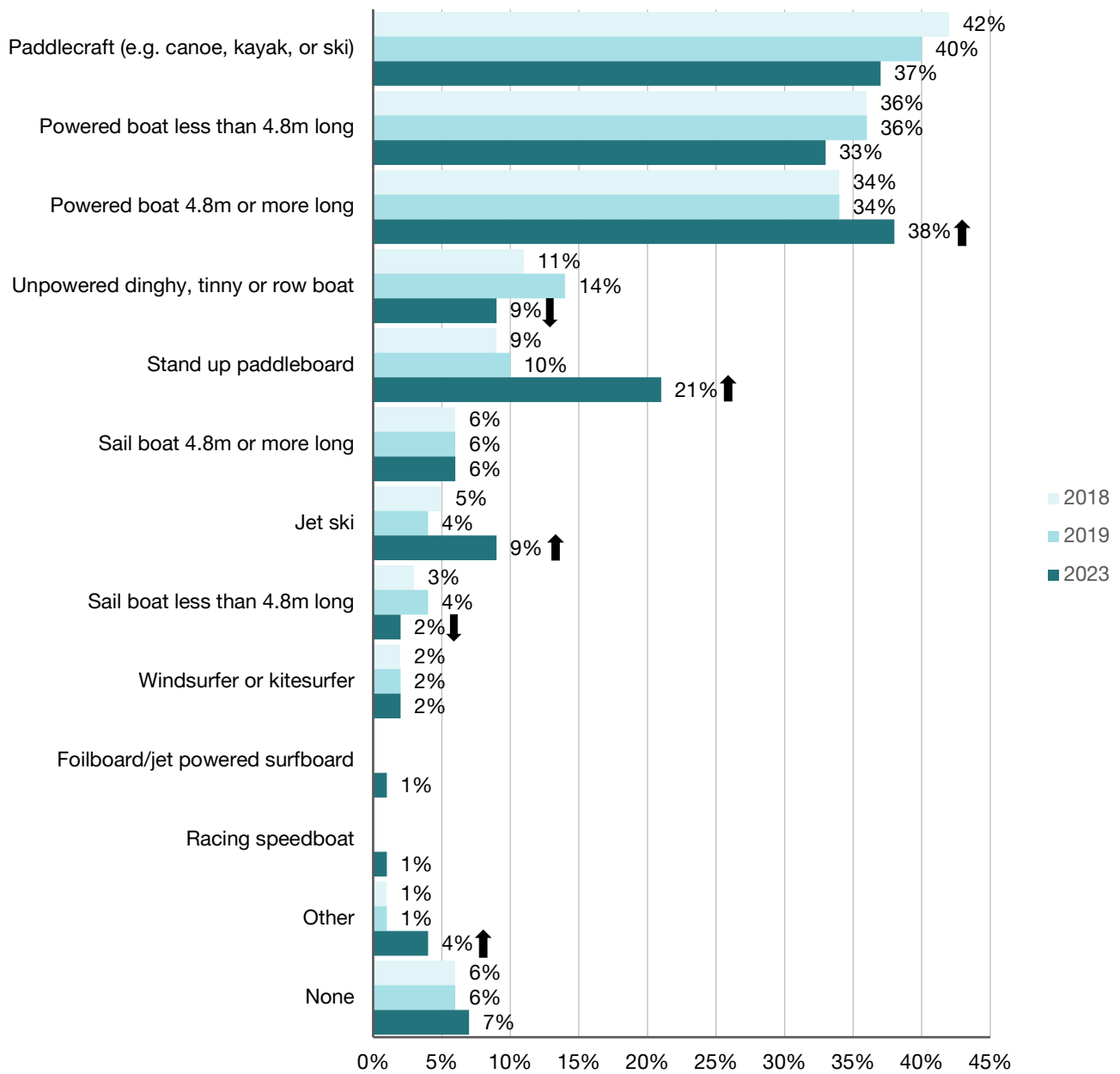
### 3. BOATING BEHAVIOUR SURVEY FINDINGS

#### Vessel ownership

In 2023, powerboats 4.8m+ long were the most commonly owned vessel type. The proportion of boaters whose household owned a stand-up paddleboard more than doubled in 2023 (21%, against 10% in 2019), as did the proportion owning jet skis (9% in 2023, against 4% in 2019).

Figure 3: Vessel ownership

**Q6 Which, if any, of the following types of recreational boats or watercraft does your household own?**  
 Base: All respondents (2018 n=3,079, 2019 n=2,191, 2023 n=1,593)





### 3. BOATING BEHAVIOUR SURVEY FINDINGS

As shown in **Table 1** below, large sailboats were the oldest vessels used, perhaps reflecting high purchase prices and a lack of contemporary ‘mid-sized’ models compared with 30 or 40 years ago. By contrast, stand-up paddleboards/foil boards tended to be newer (few available 10+ years ago). Jet skis were typically newer than powered boats, perhaps due to the growth in jet ski numbers over the past four years.

**Table 1: Age of vessel use most often (of each vessel type)**

	Under 1 year old	1 to 5 years	5 to 10 years	10 to 20 years	More than 20 years
Powered boat under 4.8m	3.9%	19.1%	26.3%	33.2%	17.5%
Powered boat 4.8m+	4.2%	20.2%	19.0%	35.1%	21.5%
Paddle craft	6.0%	50.8%	32.4%	8.2%	2.6%
Stand-up paddleboard	18.2%	68.1%	13.2%	0.5%	0.0%
Sailboat 4.8m+	0.0%	5.3%	6.9%	26.0%	61.8%
Unpowered rowing dinghy	7.0%	16.5%	23.1%	28.8%	24.5%
Jet ski	17.2%	47.4%	23.3%	9.7%	2.5%
Water-ski vessel	2.6%	14.6%	20.3%	28.5%	34.0%
Sailboat under 4.8m	2.5%	22.4%	14.2%	35.5%	25.4%
Windsurfer	0.0%	36.3%	13.1%	29.8%	20.8%
Foil board	45.4%	41.8%	12.8%	0.0%	0.0%
Racing speedboat	31.5%	6.1%	17.5%	23.0%	21.9%
<b>TOTAL</b>	7.0%	33.5%	22.7%	22.4%	14.4%



### 3. BOATING BEHAVIOUR SURVEY FINDINGS

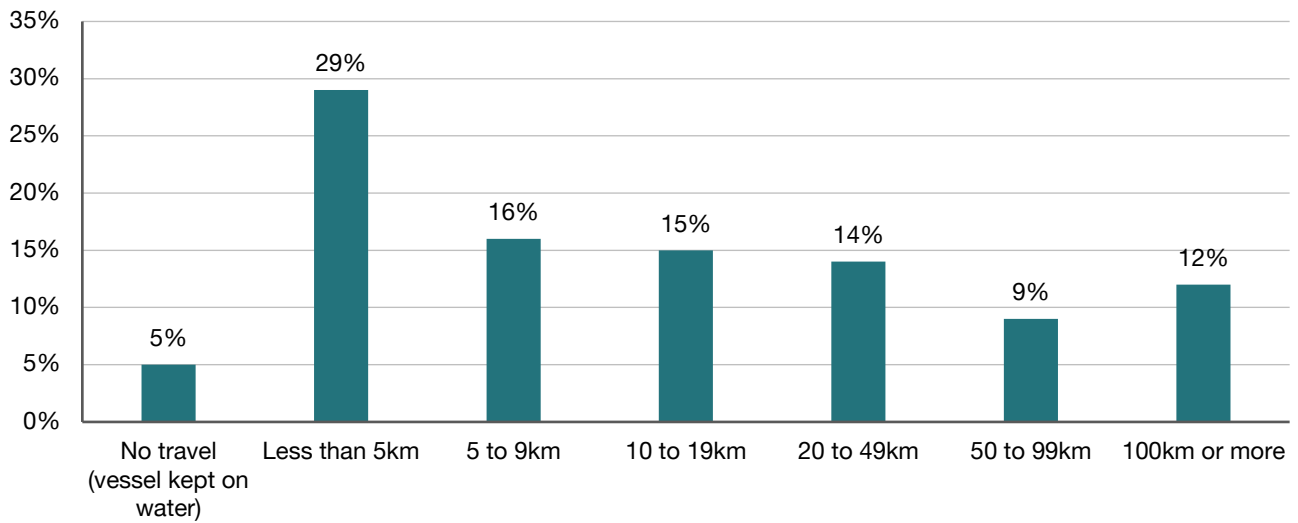
#### Travel to the water

Slightly more than a third (35%) of those who owned a vessel usually travelled less than 5km to access the water (see **Figure 4** below). However, 35% of boat owners typically travelled much further – 20 km or more. These results highlight the need for both local and regional boating access facilities.

**Figure 4: How far travel from home to water**

**Q8** How far do you usually travel from your home to access the water when using a vessel that you own?

Base: Own a vessel 2023 (n=1,517)





### 3. BOATING BEHAVIOUR SURVEY FINDINGS

#### Safety equipment on board

Most vessel types had either similar or increased carriage of most types of safety gear in 2023 compared with 2019 (see **Table 2** below – black numbers meaning similar, blue numbers meaning significantly increased). However, unpowered rowing dinghies saw several decreases (red numbers) and no significant increases. The largest increase between 2019 and 2023 was GPS digital chart on powered boats under 4.8m long. The largest decreases were buckets and compass on sailboats under 4.8m long.

**Table 2: Safety equipment carried on board**

YEAR	POWERED BOAT 4.8M+		POWERED BOAT UNDER 4.8M		SAILBOAT 4.8M+		SAILBOAT UNDER 4.8M		DINGHY	
	2019	2023	2019	2023	2019	2023	2019	2023	2019	2023
	n	978	700	954	736	260	154	116	54	295
Oars or paddle	79%	85.9%	91%	95.9%	30%	40.4%	18%	31.0%	81%	86.5%
Enough lifejackets	98%	99.0%	97%	96.1%	99%	98.0%	71%	74.8%	64%	69.0%
Flares	74%	79.3%	34%	40.7%	86%	83.4%	8%	4.9%	6%	1.0%
EPIRB	60%	68.8%	17%	24.1%	73%	75.4%	4%	7.4%	1%	3.2%
Bucket	93%	94.1%	88%	92.8%	96%	91.4%	44%	21.7%	49%	34.2%
Marine radio	80%	84.9%	38%	41.0%	86%	92.4%	9%	6.1%	2%	3.4%
Anchor	99%	98.4%	95%	94.6%		95.4%	17%	17.3%	49%	32.0%
Drinking water	93%	95.1%	83%	84.5%	97%	97.4%	52%	43.0%	32%	22.5%
Sound signal	91%	92.0%	70%	78.0%	88%	87.4%	8%	16.6%	17%	14.8%
Fire extinguisher	98%	98.5%	72%	79.2%	94%	93.2%	10%	7.4%	10%	8.7%
V sheet	78%	82.6%	44%	48.4%	87%	82.5%	5%	9.6%	9%	1.0%
Floating torch	94%	95.9%	81%	83.8%	93%	91.7%	8%	12.1%	24%	17.3%
Paper map	56%	47.9%	28%	25.7%	83%	80.2%	7%	6.4%	6%	2.8%
GPS chart	72%	80.7%	34%	47.6%	68%	73.6%	5%	2.5%	2%	3.4%
Compass	82%	85.3%	47%	48.5%	92%	93.1%	34%	11.8%	11%	5.5%
Mobile phone	97%	98.4%	91%	94.0%	95%	93.7%	32%	33.4%	61%	49.2%
Other	NA	7.3%	NA	4.9%	NA	11.8%	NA	1.5%	NA	3.2%
None of these	0%	0.0%	1%	0.2%	0%	0.7%	12%	7.6%	8%	6.6%
Don't know	NA	0.0%	NA	0.1%	NA	0.0%	NA	0.0%	NA	0.0%



### 3. BOATING BEHAVIOUR SURVEY FINDINGS

**Table 3 Safety equipment carried on board (2023)**

	Powered boat 4.8m+	Powered boat under 4.8m	Sailboat 4.8m+	Sailboat under 4.8m	Dinghy
<b>n=</b>	<b>700</b>	<b>736</b>	<b>154</b>	<b>54</b>	<b>121</b>
<b>Oars or paddle</b>	85.9%	95.9%	40.4%	31.0%	86.5%
<b>Enough lifejackets</b>	99.0%	96.1%	98.0%	74.8%	69.0%
<b>Flares</b>	79.3%	40.7%	83.4%	4.9%	1.0%
<b>EPIRB</b>	68.8%	24.1%	75.4%	7.4%	3.2%
<b>Bucket</b>	94.1%	92.8%	91.4%	21.7%	34.2%
<b>Marine radio</b>	84.9%	41.0%	92.4%	6.1%	3.4%
<b>Anchor</b>	98.4%	94.6%	95.4%	17.3%	32.0%
<b>Drinking water</b>	95.1%	84.5%	97.4%	43.0%	22.5%
<b>Sound signal</b>	92.0%	78.0%	87.4%	16.6%	14.8%
<b>Fire extinguisher</b>	98.5%	79.2%	93.2%	7.4%	8.7%
<b>V sheet</b>	82.6%	48.4%	82.5%	9.6%	1.0%
<b>Floating torch</b>	95.9%	83.8%	91.7%	12.1%	17.3%
<b>Paper map</b>	47.9%	25.7%	80.2%	6.4%	2.8%
<b>GPS chart</b>	80.7%	47.6%	73.6%	2.5%	3.4%
<b>Compass</b>	85.3%	48.5%	93.1%	11.8%	5.5%
<b>Mobile phone</b>	98.4%	94.0%	93.7%	33.4%	49.2%
<b>Other</b>	7.3%	4.9%	11.8%	1.5%	3.2%
<b>None of these</b>	0.0%	0.2%	0.7%	7.6%	6.6%
<b>Don't know</b>	0.0%	0.1%	0.0%	0.0%	0.0%

#### Own lifejackets

Almost all respondents (97%) claimed to own one or more lifejackets. Significantly more respondents who most recently used a stand-up paddleboard (29.9%) or windsurfer/kite surfer (27.0%) did not own any lifejackets. Those who were inexperienced (less than 200 hours/2 years) with using the vessel of their most recent trip had significantly higher proportion who did not own any lifejackets (7.3%), compared to 2.0% of those who were very experienced (more than 1000 hours/10 years) and 2.3% of those experienced (200-1000 hours/2-10 years).

Significantly more respondents (11.3%) whose purpose of their most recent trip was fitness/training said they did not own any lifejackets. When this is broken apart by all the situations where lifejacket is required versus not, 6.1% whose most recent trip was for fitness/training in situations where lifejacket wear was required did not own any lifejackets, compared to 18.4% whose most recent trip was for fitness/training in situations where lifejacket wear was not required did not own any lifejackets.



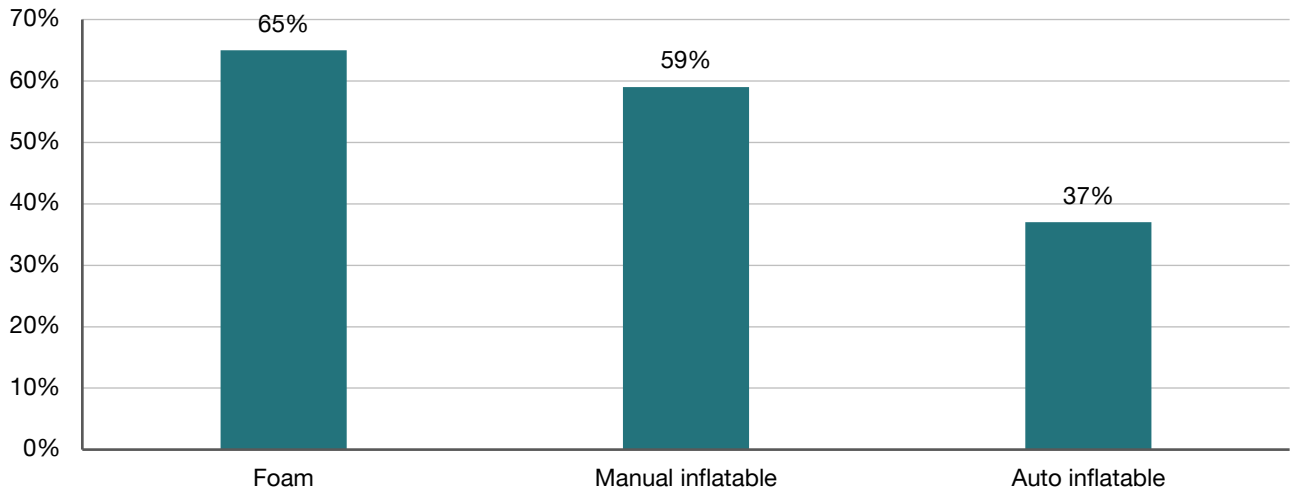
### 3. BOATING BEHAVIOUR SURVEY FINDINGS

Foam lifejackets were nearly twice as popular as auto inflatable in 2023 (see **Figure 5** below). Significantly more females (75.6%) owned a foam lifejacket than males (63.4%). Significantly more males (60.8%) owned a manual inflatable lifejacket than females (43.0%).

**Figure 5: Types of lifejackets owned**

**Q13** What type of lifejacket(s) do you own?

Base: Own lifejackets 2023 (n=1,564)

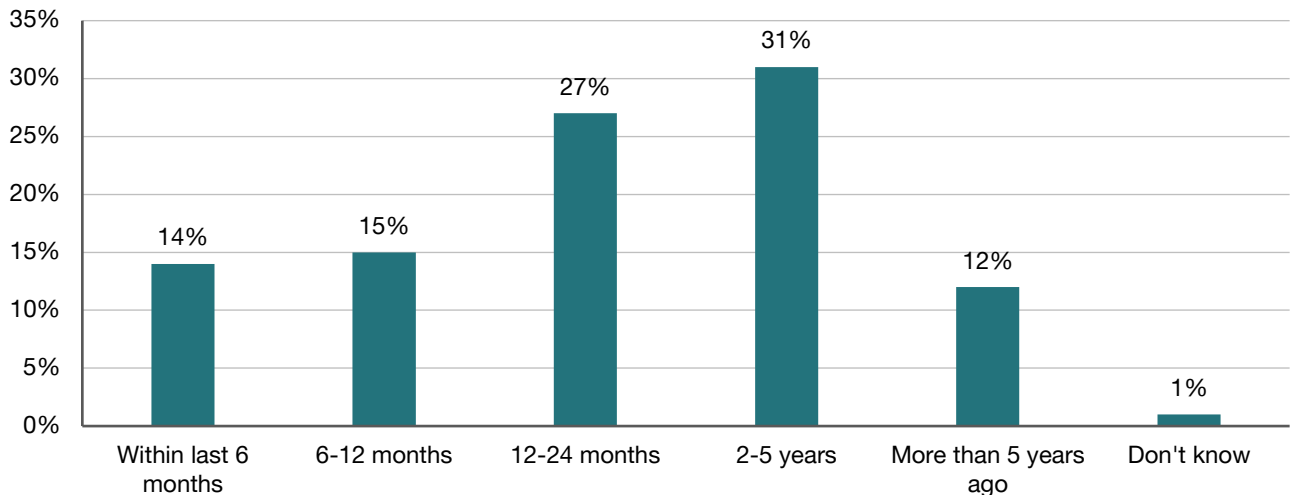


Fifty-six percent of those that own an inflatable lifejacket purchased the one they use most often in the last two years (see **Figure 6** below).

**Figure 6: How old is inflatable jacket used most often**

**Q14** Thinking about the inflatable lifejacket you use most often, when did you purchase it?

Base: Own an inflatable lifejacket 2023 (n=1,300)







### 3. BOATING BEHAVIOUR SURVEY FINDINGS

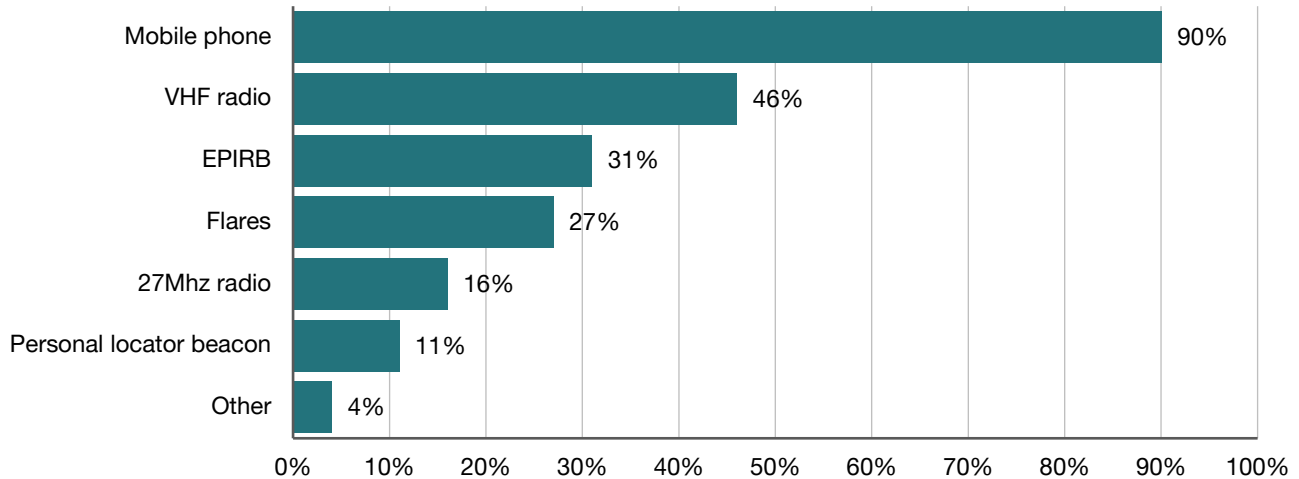
#### Raising alarm

In relation to equipment to raise an alarm (**Figure 7** below), 90% of respondents preferred to use their mobile phone. Slightly under half (46%) preferred a VHF radio.

**Figure 7: Preferred method of raising alarm**

**Q16A** Which are your preferred methods of raising an alarm or seeking help in an emergency situation?

Base: All respondents 2023 (n=1,593)



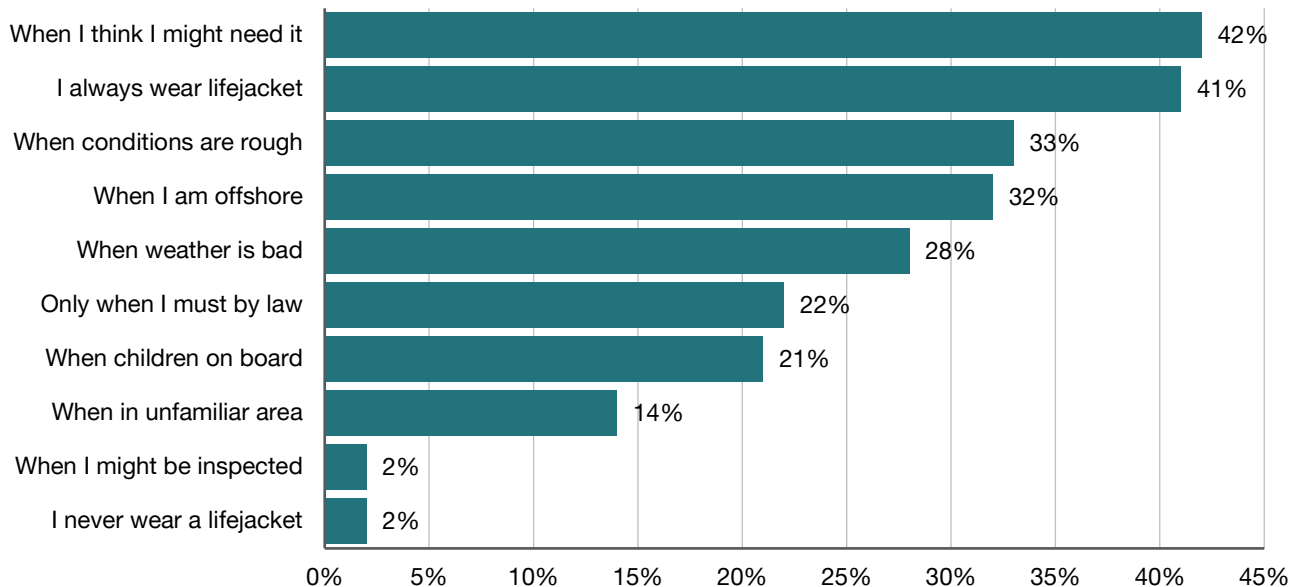
#### Wearing a lifejacket

Regarding lifejacket wearing (**Figure 8** below), 42% of respondents said they only wore lifejackets “when I think I need to”, against 41% saying they always wore one. One third said they wore one when seas were rough. (Note: multiple responses were allowed.)

**Figure 8: When is a lifejacket worn**

**Q16B** On a typical boating trip when would you wear a lifejacket?

Base: All respondents 2023 (n=1,593)





### 3. BOATING BEHAVIOUR SURVEY FINDINGS

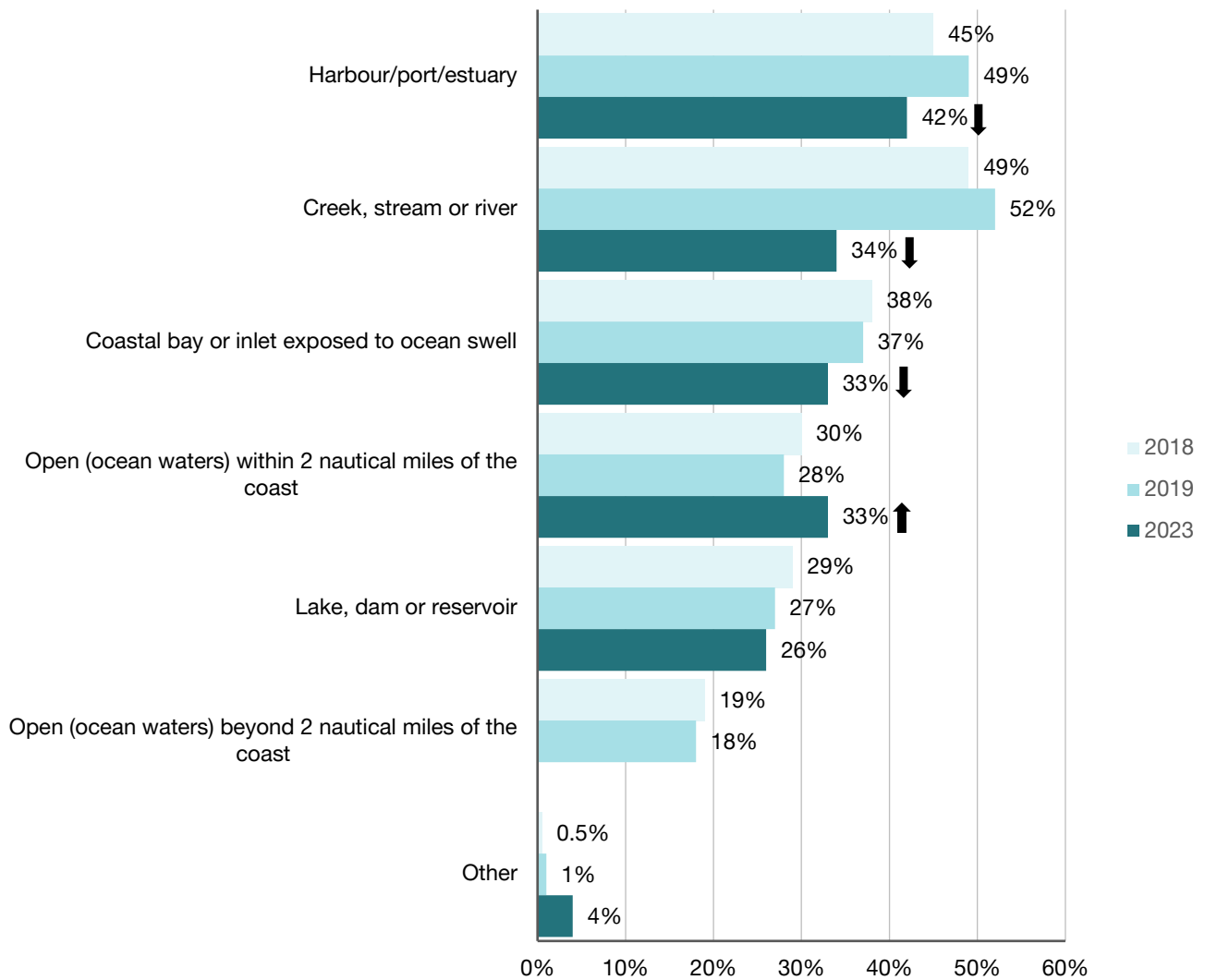
#### Waterways use

As shown in **Figure 9** (below), significantly more respondents used the open ocean for their most recent trip in 2023 compared to 2019. Significantly less respondents used harbour/port/estuary, creek/stream/river, or coastal bay or inlet exposed to ocean swell in 2023 compared to 2019.<sup>2</sup>

**Figure 9: Waterways used in most recent trip**

**Q20** Which of the following types of waterways did you use during this trip?

Base: All respondents (2018 n=3,079, 2019 n=2,191, 2023 n=1,593)



<sup>2</sup> Note that “Open (ocean waters) beyond 2 nautical miles of the coast” was accidentally omitted from 2023 questionnaire. It is reasonable to assume that the 2023 figure would have been similar to or slightly larger than 2019 (given increase in the “within 2 nautical miles” category and increase in “other”),

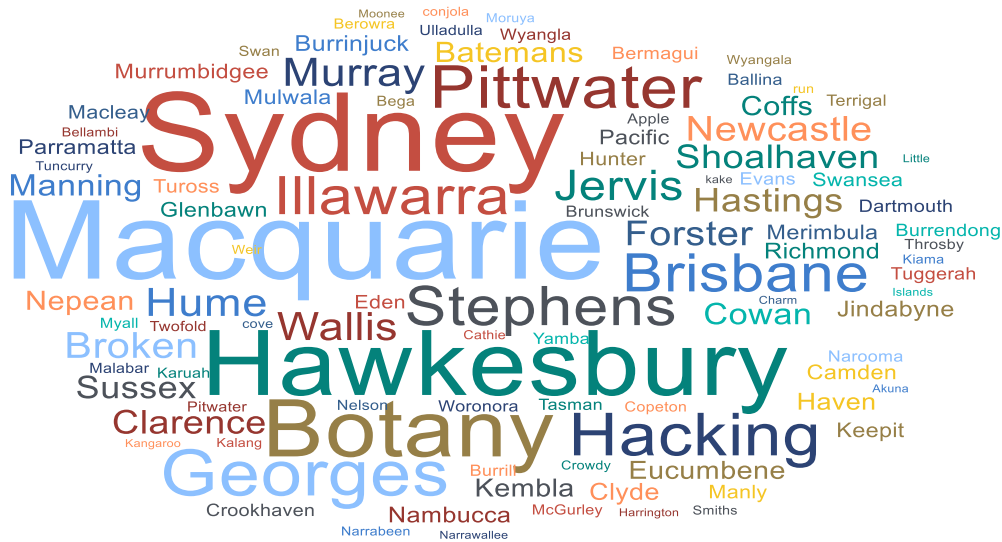


### 3. BOATING BEHAVIOUR SURVEY FINDINGS

As shown in word cloud **Figure 10** below, sheltered estuaries like Sydney Harbour, Botany Bay, Lake Macquarie and Pittwater featured highly in the most frequent trips.

**Figure 10: Specific waterways use most often**

**Q21A** And which specific waterways do you used most often? E.g., Sydney Harbour, Lake Macquarie?  
 Base: All respondents 2023 (n=1,593)

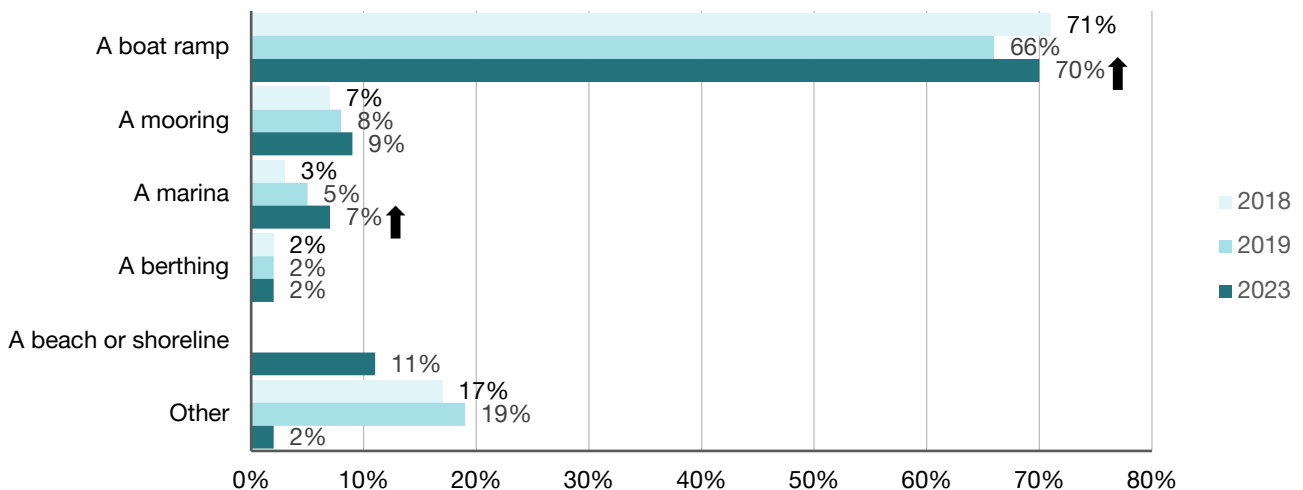


#### Launching of most recent trip

As shown in **Figure 11** (below), significantly more respondents launched their most recent trip from a boat ramp and from a marina in 2023 compared to 2019 (Note that “A beach or shoreline” was not an available option for respondents in 2018/2019. It is therefore likely people who launched from a beach or shoreline responded “Other” in those years).

**Figure 11: How vessel was launched**

**Q22** Where did you launch the vessel on this trip?  
 Base: Boated recreationally in NSW waters (2018 n=3,066, 2019 n=2,178, 2023 n=1,593)



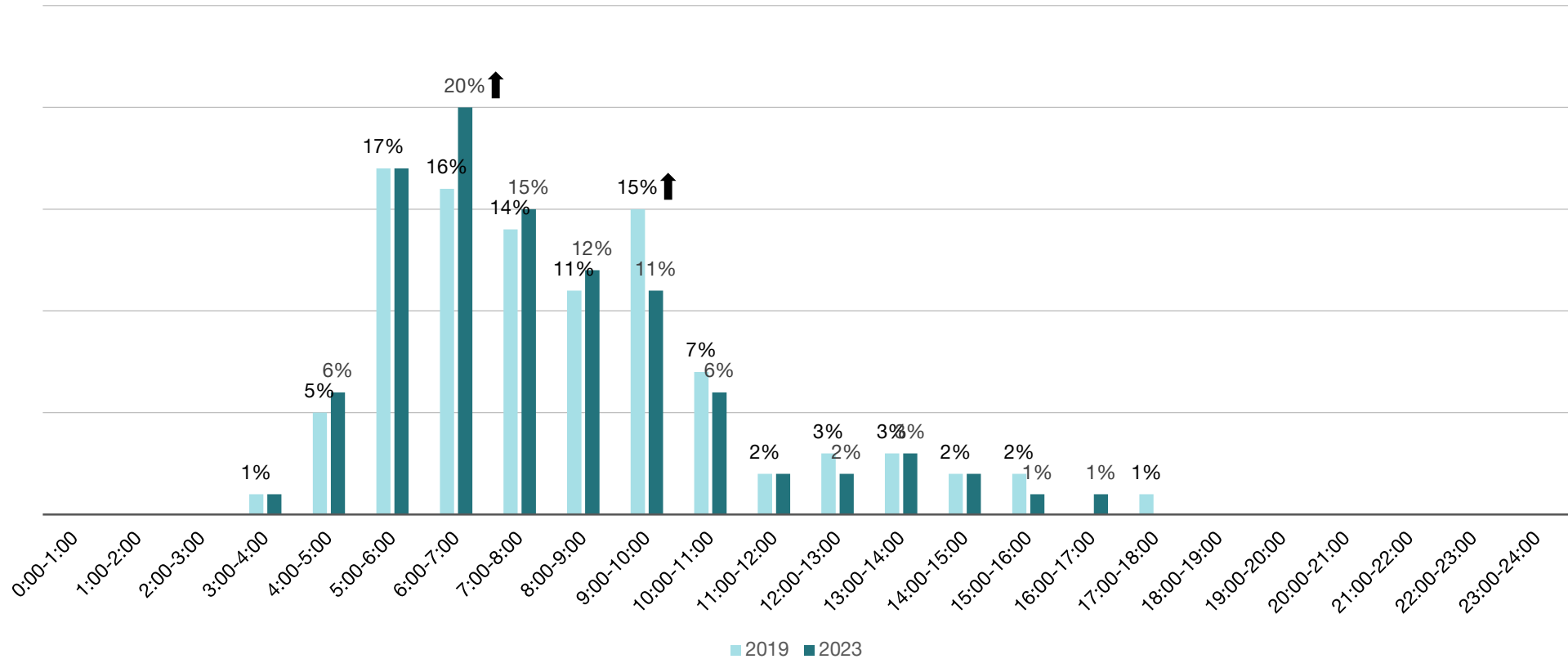


### 3. BOATING BEHAVIOUR SURVEY FINDINGS

The ‘peak period’ for launching was between 5am and 10am – accounting for 75% of launches in 2023 and 73% in 2019 (see **Figure 12** below).

**Figure 12: Day trip start times**

**Q23** About what time of the day did you launch on this trip?  
Base: Boaters who spent time in recreational boats or watercraft and did not stay overnight, excluding don't know responses (2019 n=1,763 2023 n=1,319)



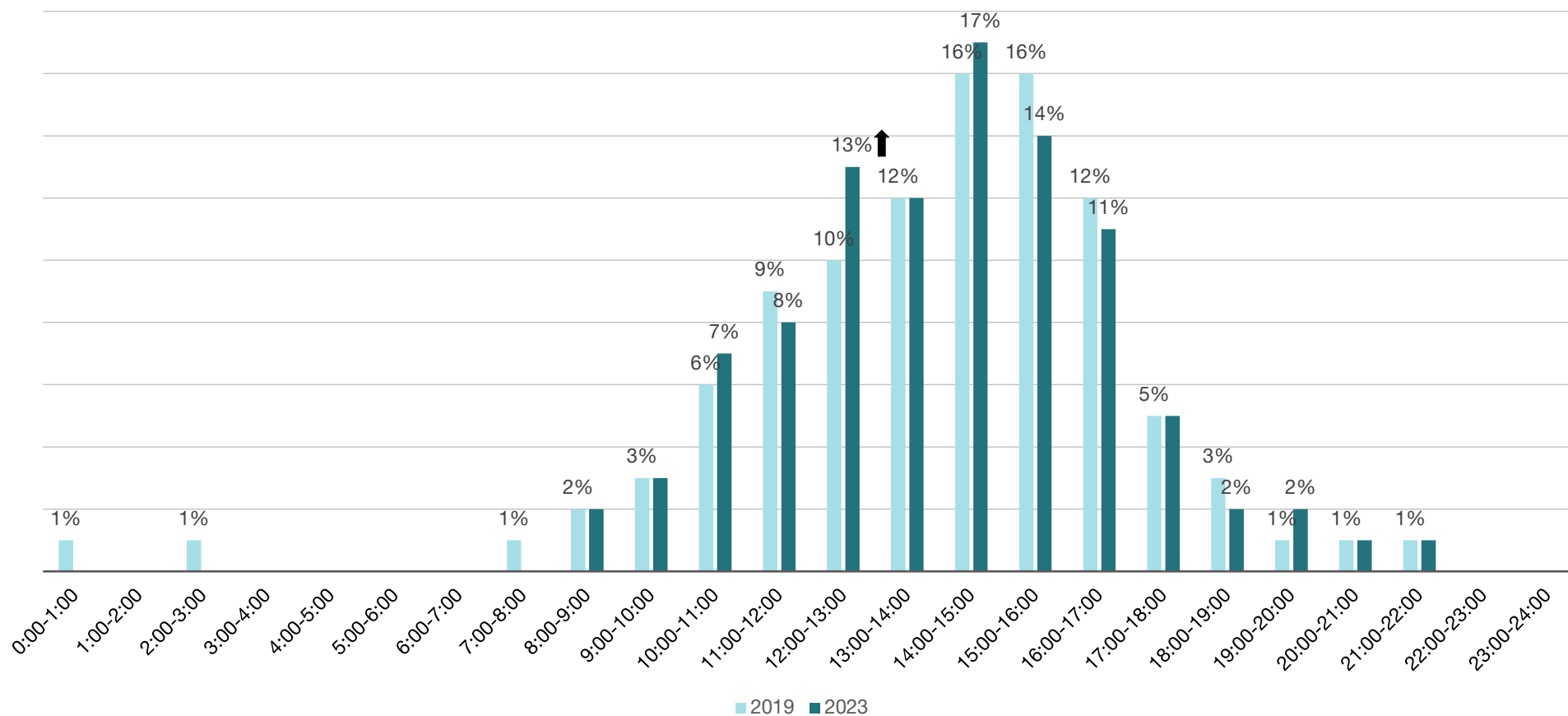


### 3. BOATING BEHAVIOUR SURVEY FINDINGS

The ‘peak period’ for finishing trips was between noon and 5pm – accounting for 67% of trips in 2023 and 66% in 2019 (see **Figure 13** below).

**Figure 13: Day trip finish times**

**Q26** And what time did you finish your trip?  
 Base: Boaters who spent time in recreational boats or watercraft and did not stay overnight, excluding don't know responses (2019 n=1,763 2023 n=1,319)





### 3. BOATING BEHAVIOUR SURVEY FINDINGS

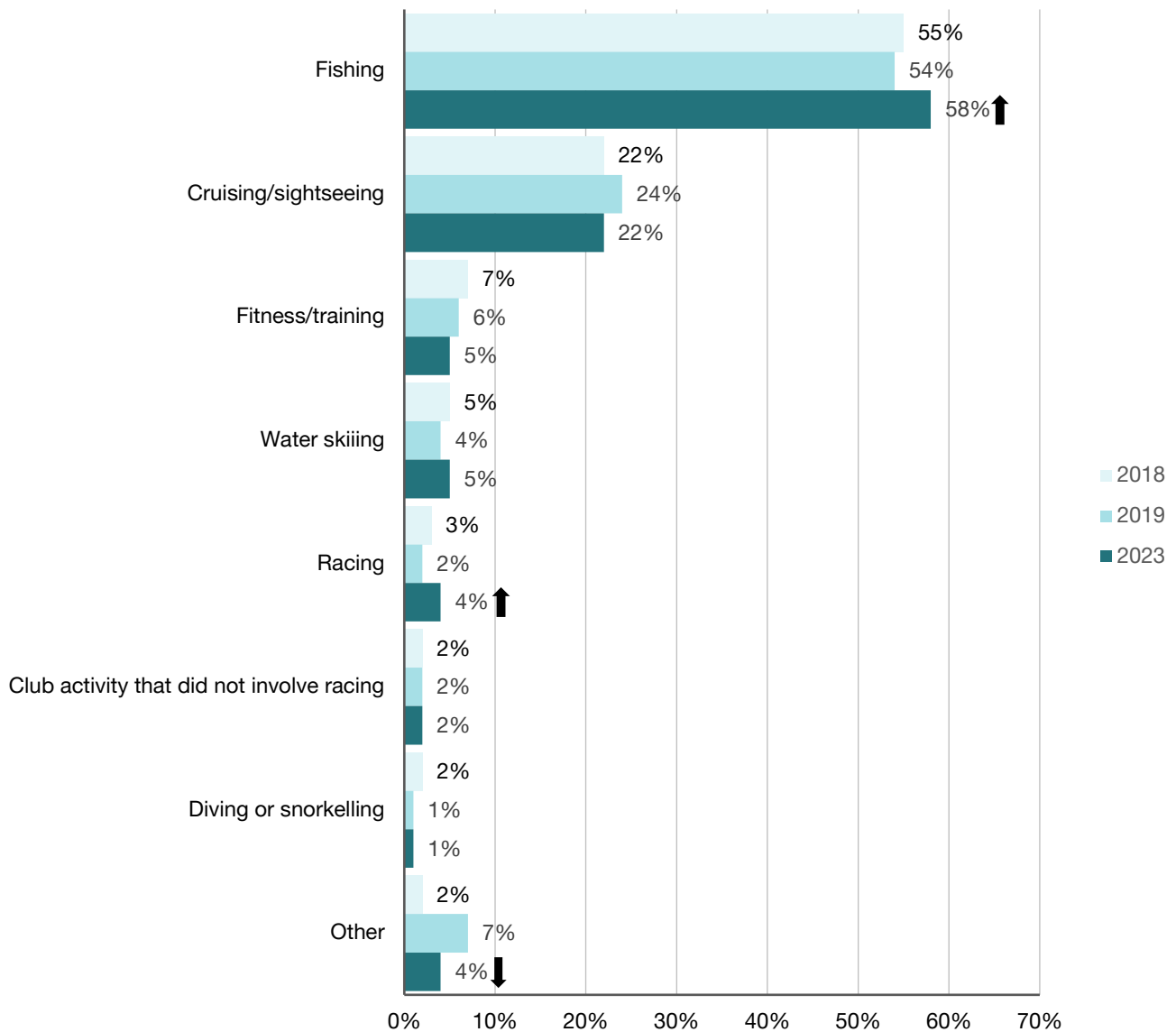
#### Activities during most recent trip

Fishing was by far the most popular main purpose of a boating trip cited by boaters, being more than twice as popular as the next most popular purpose: cruising/sightseeing. Significantly more of the most recent trips in 2023 were for fishing and racing compared to 2019 (see **Figure 14** below).

**Figure 14: Main purpose of trip**

**Q27** What was the main purpose of this trip?

Base: Boated recreationally in NSW waters (2018 n=3,066, 2019 n=2,178, 2023 n=1,593)





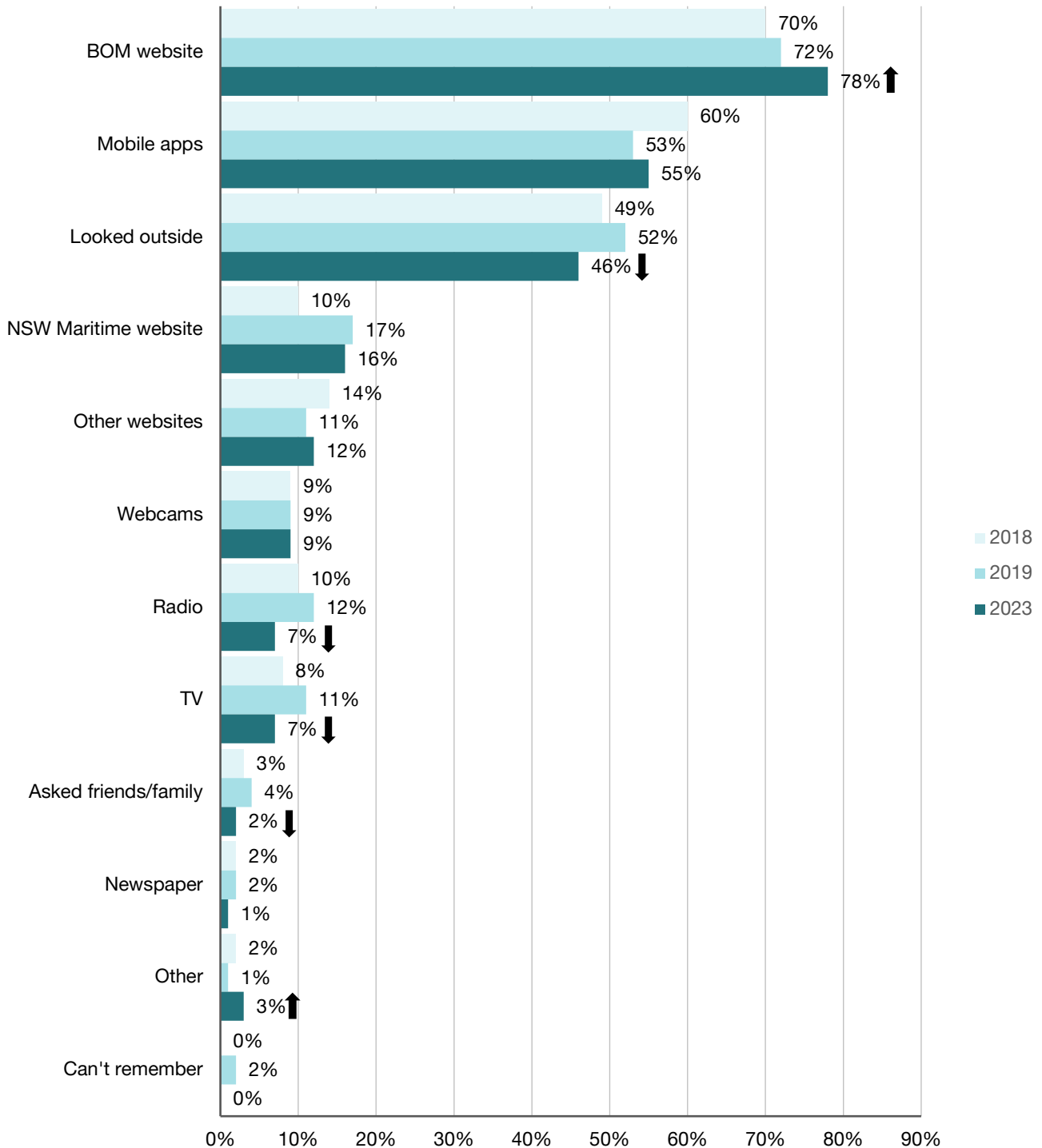


### 3. BOATING BEHAVIOUR SURVEY FINDINGS

An overwhelming majority of respondents (88%) checked the weather in some way before their boating trip, and 66% used at least two methods of checking. As shown on **Figure 15** below, significantly more respondents checked the Bureau of Meteorology website in 2023 compared to 2019, and significantly less respondents “looked outside”.

**Figure 15: How did you check the weather before trip**

**Q29** And how did you check the weather before this trip?  
 Base: Checked the weather before leaving home (2018 n=2,671, 2019 n=1,877, 2023 n=1,409)





### 3. BOATING BEHAVIOUR SURVEY FINDINGS

#### Safety equipment during most recent trip

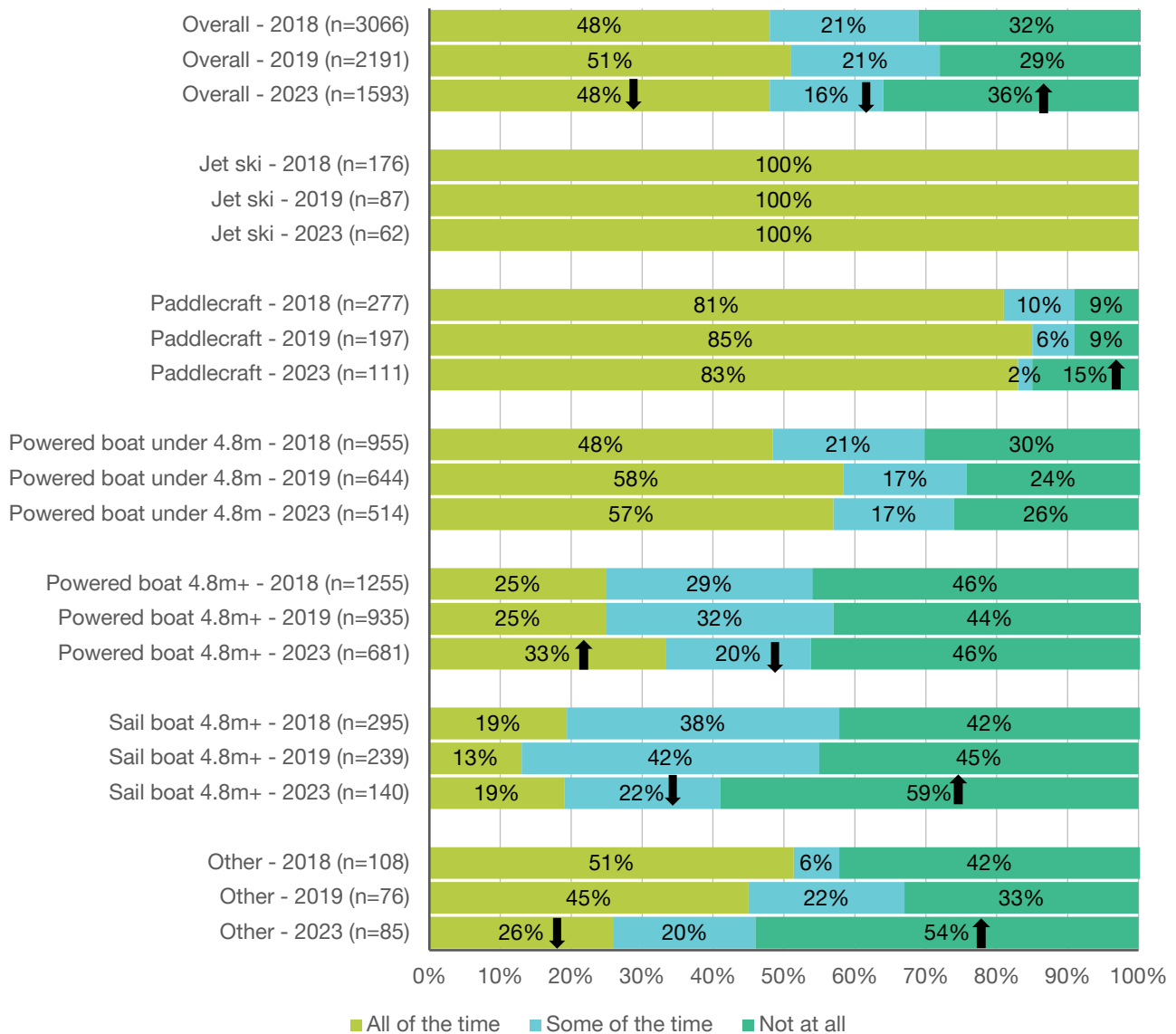
Just under half of those surveyed (48%) said they wore a lifejacket “all the time” on their most recent trip in 2023 (significantly lower than 51% in 2019), 16% said “some of the time” in 2023 (significantly lower than 21% in 2019) and 36% “not at all” in 2023 (significantly higher than 29% in 2019)

Lifejacket usage was relatively consistent by vessel type from previous to current waves of surveying. However, there was a jump (from 25% to 33%) in the proportion of those venturing out in a larger powerboat who claimed to wear a lifejacket all of the time (see **Figure 16** below).

**Figure 16: Life jacket use by vessel type**

**Q30** On this trip, did you wear a lifejacket?

Base: Boated recreationally in NSW waters (2018 n=3,066, 2019 n=2,178, 2023 n=1,593)





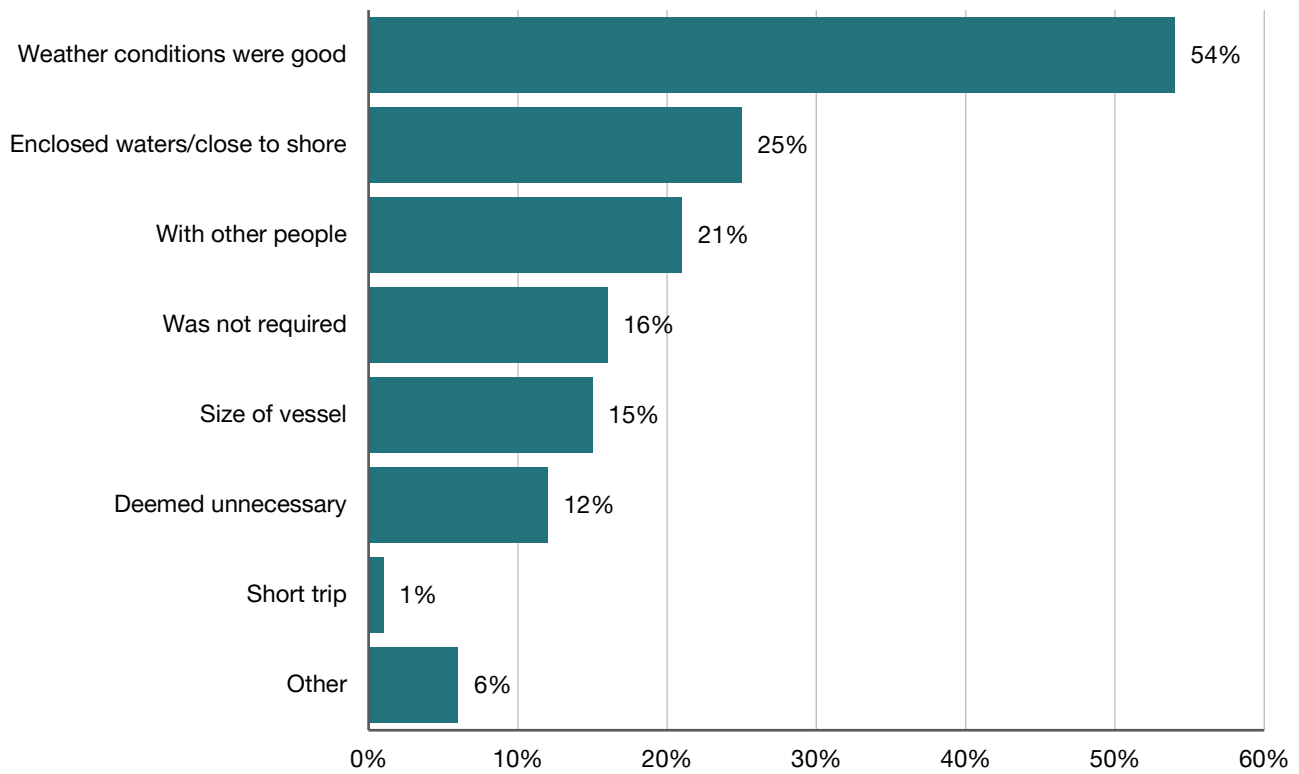
### 3. BOATING BEHAVIOUR SURVEY FINDINGS

As shown in **Figure 17** below, the primary reason put forward for not using a lifejacket was because weather conditions were good, which was twice as important a factor to non-wearers as being in a perceived safe boating area (i.e., enclosed water or close to shore). One in five non-lifejacket wearers believed that being with other people made lifejacket wear less necessary. Only a very small proportion (<0.01%) of non-wearers cited lack of comfort as a reason for not wearing a lifejacket.

**Figure 17: Why not wear a lifejacket**

**Q31 Why didn't you wear a lifejacket?**

Base: Did not wear lifejacket 2023 (n=582)





### 3. BOATING BEHAVIOUR SURVEY FINDINGS

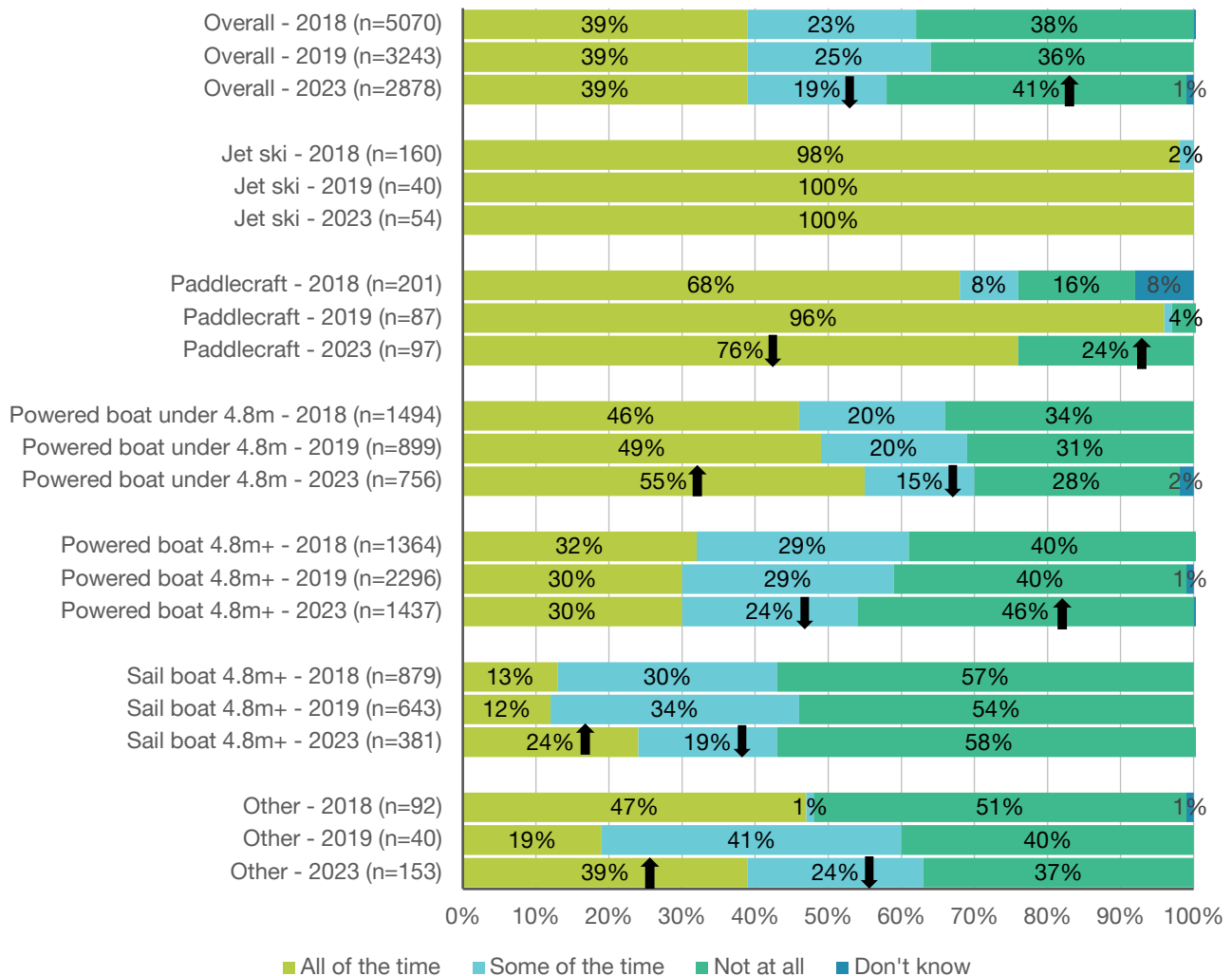
Lifeguard-wear among passengers appears to have declined from 2019 to 2023. In 2019, 36% of passengers (i.e., other than skipper) were reported to have not worn a lifejacket on their most recent trip. This increased to 41% in 2023, a statistically significant difference.

As shown in **Figure 18** below, significantly less passengers on paddle craft wore a lifejacket all of the time in 2023 (76%) than in 2019 (96%). However, in 2023, significantly more passengers in a power boat 4.8m+ (55%, compared to 49% in 2019), sailboat 4.8m+ (24%, compared to 12% in 2019), and other vessels (39%, compared to 19% in 2019) wore a lifejacket all of the time.

**Figure 18: Other passengers life jacket use by vessel type**

**Q37** For each person on board the vessel with you, were they wearing a lifejacket?

Base: All respondents (2018 n=3,079, 2019 n=2,191, 2023 n=1,593)





### 3. BOATING BEHAVIOUR SURVEY FINDINGS

#### Boating infrastructure and amenities

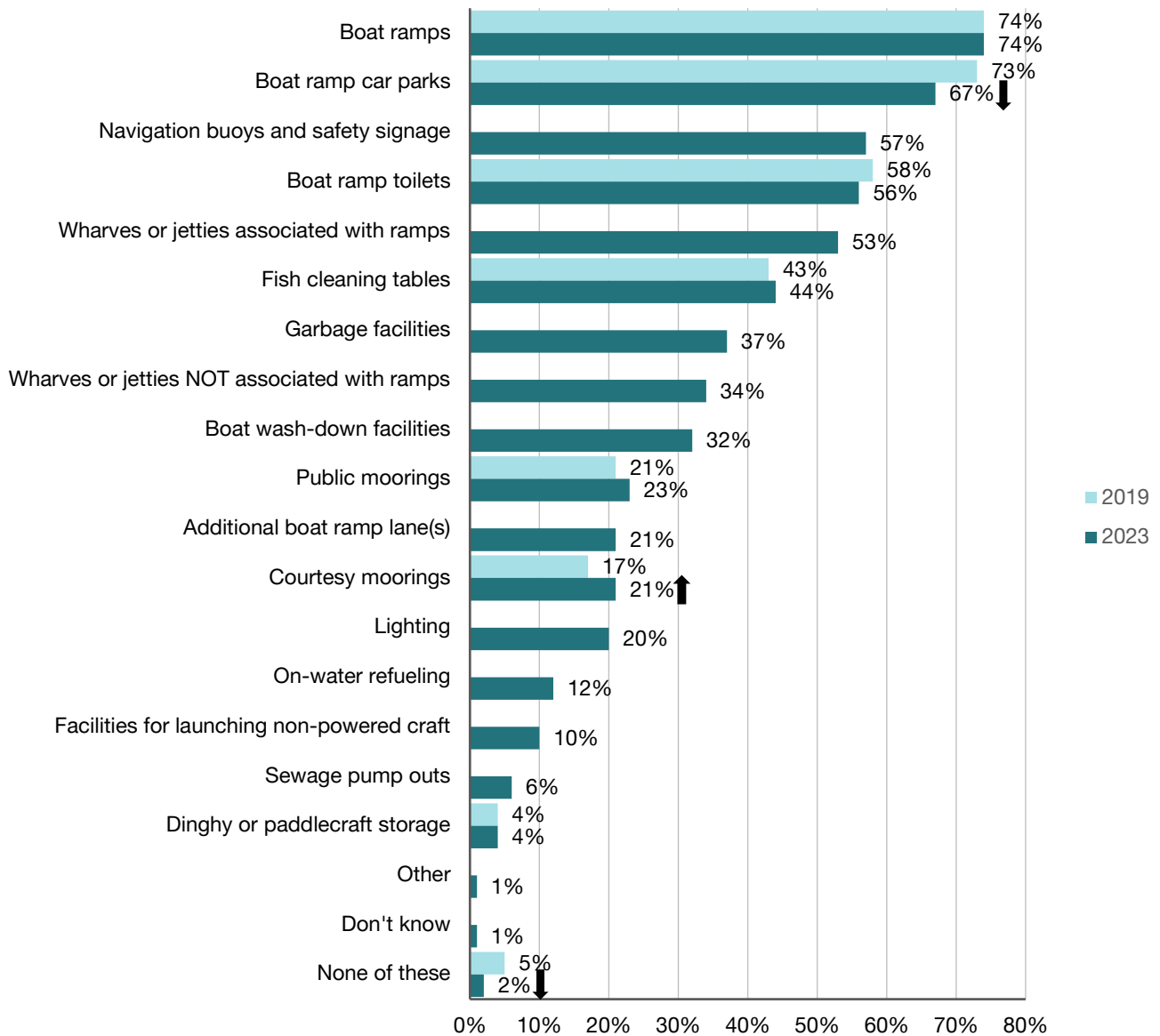
While there was minimal change in usage of boating infrastructure and amenities overall, there was a significant decrease in usage of boat ramp car parks in 2023 (67% in 2023, 74% in 2019), and a significant increase in usage of courtesy moorings (21% in 2023, 17% in 2019) (see **Figure 19** below).

The infrastructure and amenities which were used most by boaters included boat ramp and carparks, navigation buoys and signage, toilets, wharves and jetties. (The ten rows in **Figure 19** below that do not have 2019 results are for options that were not presented to respondents in 2019.)

**Figure 19: Infrastructure use**

**Q43** Which of the following types of infrastructure and amenities do you typically use when boating?

Base: All respondents (2019 n=2,191, 2023 n=1,593)





### 3. BOATING BEHAVIOUR SURVEY FINDINGS

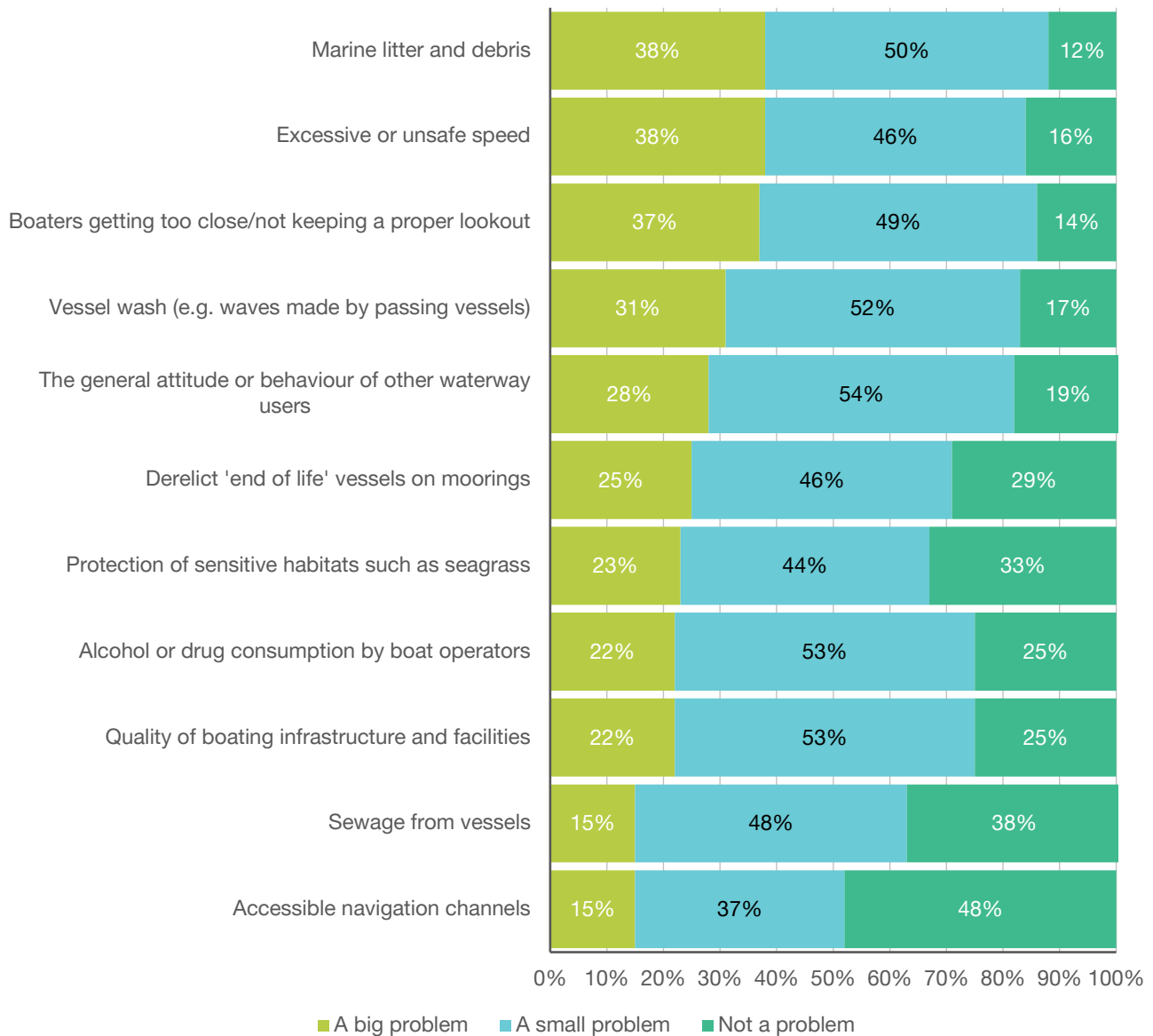
#### Problems on waterways

Survey respondents were asked about the extent to which a range of issues relating to NSW waterways were a ‘problem’. All of the potential issues presented were considered a problem to some extent by at least 50% of respondents. At least 75% of respondents considered issues related to litter, speed, safe distances/ proper lookout, vessel wash, general behaviour, and alcohol and drugs to be a problem to some extent.

Overall, marine litter and debris and excessive or unsafe speed were most likely to be considered ‘big’ problems, while sewerage from vessels and accessible navigation channels were less likely to be viewed this way (see **Figure 20** below).

**Figure 20: Problem on NSW waterways**

**Q54** To what extent do you believe the following to be a problem on NSW waterways?  
 Base: All respondents 2023 (n=1,593)





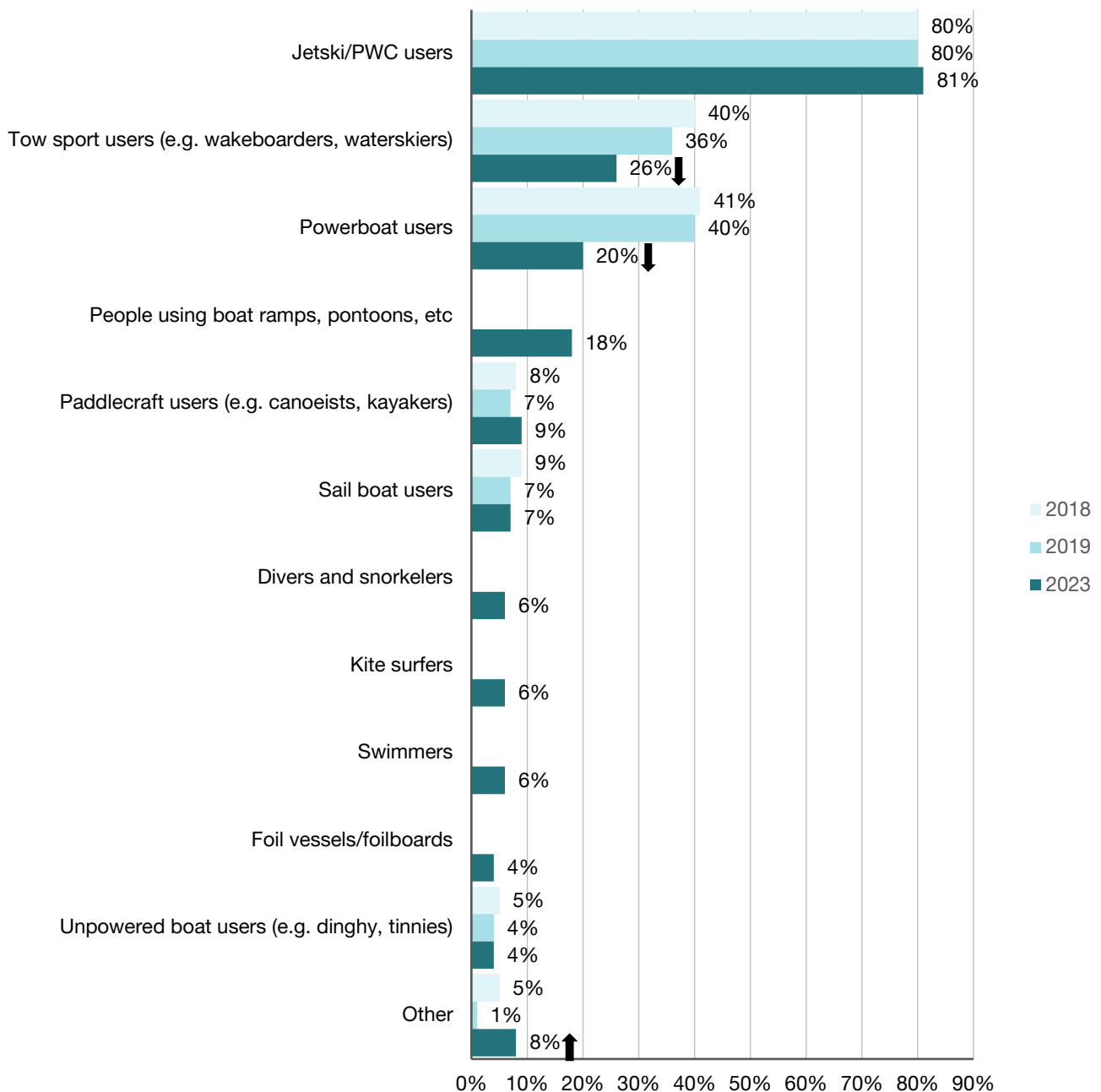


### 3. BOATING BEHAVIOUR SURVEY FINDINGS

Respondents were also asked about the extent to which different types of vessels and user groups were a problem on NSW waterways. 81% of respondents considered PWC/Jet ski users to be a problem, more than three times the next highest group (Tow sport users e.g., water-skiers/wakeboarders). The percentage of respondents citing PWC/ Jet ski users as a problem was similar to the results in 2018 and 2019. In 2023 significantly fewer respondents considered Tow sport users or Powerboat users to be problematic compared with 2019 (down from 36% to 26% and 40% to 20% respectively).

**Figure 21: Problematic waterway users**

**Q55** Do you believe any of the following specific vessel or user groups are a problem on NSW waterways?  
 Base: Identified behaviour of other users as a problem (2018 n=2,545, 2019 n=1,780, 2023 n=1,342)





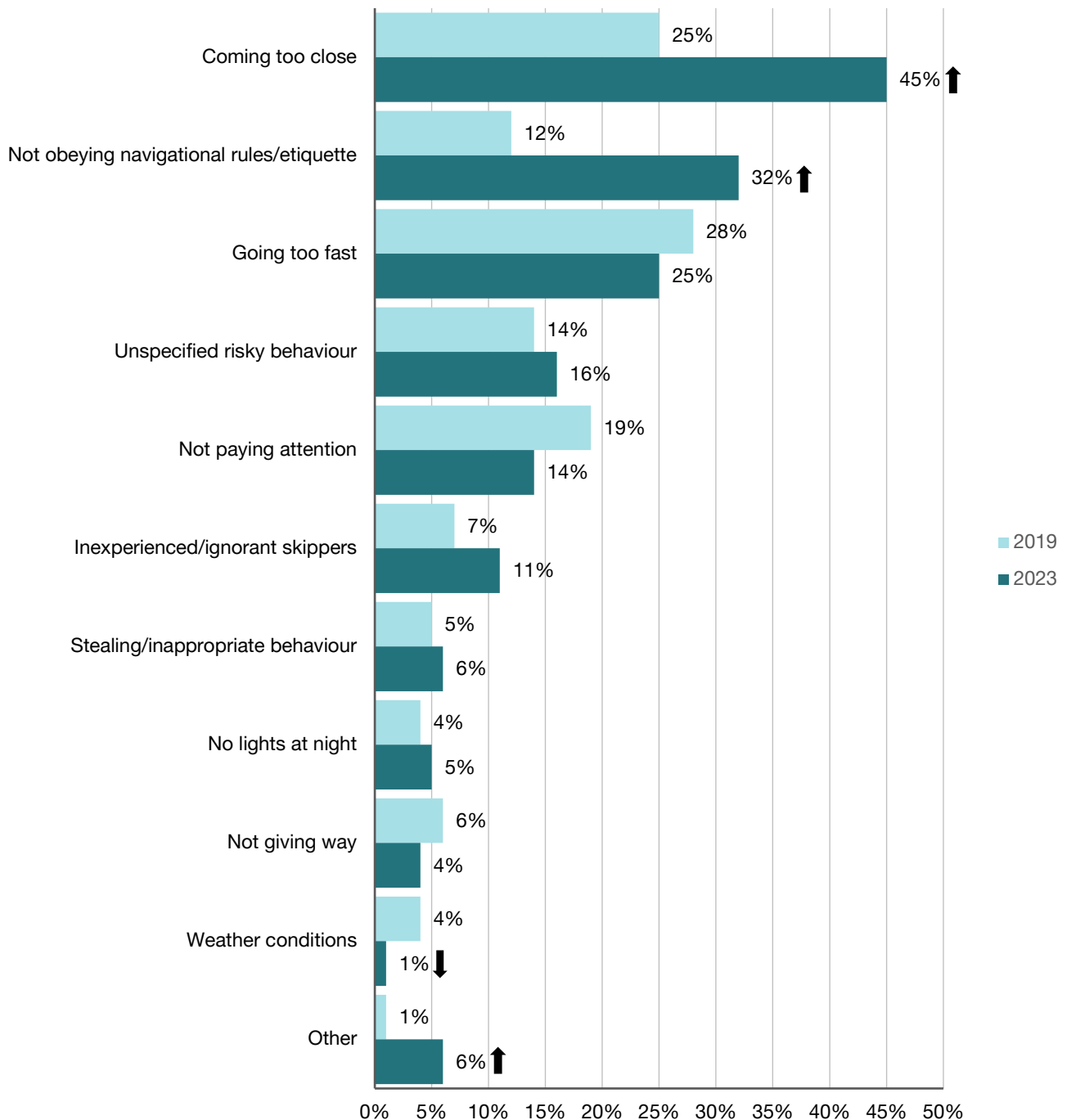
### 3. BOATING BEHAVIOUR SURVEY FINDINGS

Two percent of respondents (32 people) reported being involved in an accident in 2023. In addition, 14% (221 people) were involved in a 'near miss'. Near misses describe situations where an accident is narrowly avoided and, as such, they can point to potential safety issues that are not necessarily reflected in accident statistics. In 2023 there were significant increases in “Coming too close” and “Not obeying navigational rules” compared to 2019 (see **Figure 22** below).

**Figure 22: Near miss type**

**Q60** Briefly describe the near miss in a sentence or two

Base: Those who were involved in a near miss last summer (2019 n=314, 2023 n=221)





## 4. CONCLUSIONS

- Boating participation has risen significantly since 2018 (from 16% of NSW residents to 22%). This equates to between 1.7 and 1.85 million participants who spent time on recreational watercraft during the summer of 2022/23. Allowing for duplication between users of powered and unpowered watercraft, it appears there were more than one million users of powered boats, and also more than one million users of unpowered watercraft in NSW, over summer 2022/23.
- It should be acknowledged that the summer of 2022/23 was more favourable to boating than the previous three years, which were impacted by either bushfires (2019/20) or consistent rain events (2020/21 and 2021/22). This may partially explain the increased boating participation shown in data relating to this most recent reporting period.
- The most dramatic increases in watercraft usage were in stand-up paddleboards (from 1% in 2018 to 4% in 2023) and personal watercraft (PWC's, or jet skis) which doubled from 1% to 2%. More than one in ten NSW households (11%) now own some form of paddlecraft (kayaks, canoes etc.). Both PWC and paddlecraft have specific handling characteristics and limitations – and these findings suggest an increased need for tailored safety initiatives aimed at both these watercraft types.
- 96% of powerboats and larger sailboats claim to carry sufficient lifejackets, but only 75% of smaller sailboats. With the exception of unpowered dinghies, it's pleasing to note that usage of safety equipment was either similar or increasing for most boat types in 2023. Given the vulnerability of unpowered dinghies to events like swamping or sudden capsizes, it is important that initiatives be taken to boost the carriage of key safety equipment on these vessels.
- Around half of boat users (48%) said they wore a lifejacket “all the time” on their most recent trip, up from 42% in 2018. While lifejacket usage was relatively consistent by vessel type from previous to current waves of surveying, there was a jump (from 25% to 33%) in the proportion of those venturing out in a larger powerboat who claimed to wear a lifejacket all of the time.
- However lifejacket usage among other passengers appears to have fallen (from 42% in 2019 to 39% in 2023). This suggests that some skippers are not being firm enough with passengers on the need for lifejacket wearing.
- Given the fundamental importance of lifejacket wear in saving lives, the report's findings point to an ongoing need for initiatives to help boost lifejacket wear rates across most watercraft types.
- Boat ramp usage remains extremely high, typically used by three in four boaters. Boat ramp car parks and toilets and navigation buoys were also extremely well used. Half (48%) of respondents felt there had been improvements in the standard of boating infrastructure and amenities on NSW waterways, against 18% believing there had been a deterioration. The report's findings point to boat ramps and their associated facilities being the key means of small boat access to the state's waterways.



## 4. CONCLUSIONS

- Major problems identified by boaters included marine litter and debris (identified as a major problem by 38% of respondents), excessive or unsafe speed by other boaters (also 38%), boaters getting too close (37%), vessel wash (31%) and the general attitude of other boaters (28%). These findings strongly suggest that further education is required in maritime etiquette – in terms of safety, environmental sustainability and consideration for others.
- PWC/jet ski users are still perceived as the major problem group on NSW waterways, nominated by 81% of boat users (unchanged on previous surveys). This was followed by tow sport users on 26%. This finding may relate to the particular way PWC are often used – for ‘hooning around’ at one location – rather than for transport from A to B.
- Finally, it appears that some data in the 2023 surveys has been impacted by COVID-era recreational activities and purchases, which appears to have created a new generation of boating users. While this is obviously welcome, it does suggest that additional education may be needed to bring these less experienced boat users up to speed in relation to lifejacket wearing and other safety-related behaviours.

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